Electronic Forms Frequently Asked Questions
09/08/2020

AVAILABILITY OF FORMS FOR DOWNLOAD

Q. When will the forms be available for download from the CWTP website?
A. The three Excel files containing the CWTP forms are posted on the CWTP site. Directions for each file are also posted. The directions can also be found in the *Directions* tab of each file.

SUBMISSION TO OVR

Q. Are forms submitted electronically, or will hardcopies need to be printed and mailed?
A. Forms are submitted to the VR Counselor in electronic format (PDF).

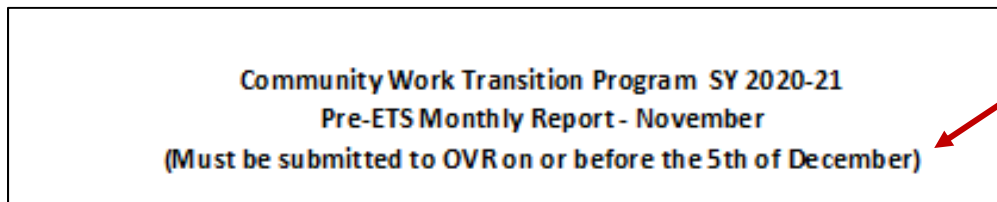**Q. Where are the pdf versions of the forms submitted?**
A. To the VR Counselor assigned to your district or school.

Q. How are these files submitted to the VR counselor? Is it just through e-mail or are they uploaded somewhere specific?
A. The PDF version of the forms can be emailed to the VR Counselor. If the school or district allows the VR Counselor access to a shared drive upon which the files are stored, they may be obtained by the VR Counselor in that manner. The CWTP form (worksheet) would still need to be converted into PDF format and named in accordance with the master rules for file name extensions.

Q: Are the monthly statements emailed to the VR Counselor at the beginning of the new month?
A: Pre-ETS Monthly Reports and Job Development/Job Coaching Monthly Reports are due to the VR Counselor on or before the 5th of the month following the provision of services. Example: The September report is due to the VR Counselor on or before the 5th of October. Each monthly report includes the due date in the title cells. See the following title examples from a Pre-ETS and Job Development/Job Coaching Monthly Report form.

Community Work Transition Program SY 2020-21
Pre-ETS Monthly Report - November
(Must be submitted to OVR on or before the 5th of December)

Job Development/Job Coaching Monthly Report - February

(Must be submitted to OVR on or before the 5th of March)

Due Dates for Monthly Reports are as follows:
- August – on or before September 5
- September – on or before October 5
- October – on or before November 5
- December – on or before January 5
- January – on or before February 5
- February – on or before March 5
- March – on or before April 5
- April – on or before May 5
- May – on or before June 5
- June – on or before July 5. Before June 30th is recommended due to end of the OVR fiscal year.

Q. Do you submit a billing statement each month or only quarterly?
A. Billing statements are due quarterly. See the timeline for Quarterly Billing Statement below.

Months in each Quarter	Quarterly Billing Statement Due Date
Quarter 1 – August September	October 5
Quarter 2 – October November December	January 5
Quarter 3 – January February March	April 5
Quarter 4 – April May June	July 5 or sooner

Q. When should I add a completed activity to the report or billing statement?
A. The best recommendation for completing a monthly report is throughout the month, as the activities are provided. But that is left to the discretion of the Employment Specialist.

Do not complete billing statements until the quarter has ended and the final monthly report for that quarter is completed. Billing statements import the service hours from each month within the quarter.

Q. Do I wait to send all monthly reports together with the billing statement? For instance would you send the monthly reports for January, February, March and the billing statement for Quarter 3 to the OVR counselor? Or would you send the last month of the quarter and the billing statement to the OVR counselor?
A. Pre-ETS Monthly Reports and Job Development/Job Coaching Monthly Reports are due on a monthly basis, on or before the 5th of the month following the provision of services. See timelines for monthly report on page 2. Therefore the January report should be submitted before February 5 and the February Report must be submitted by March 5. The March report is due April 5. The third quarter billing statement is also due on April 5. Monthly reports due at the end of a quarter can be submitted at the same time as the quarterly billing statement, because they have the same due date.

See the table below for monthly reports that have due dates that coincide with those of the quarterly billing statements.

Months in each Quarter	Quarterly Billing Statement Due Date	Monthly Report Due on Same Date as Quarterly Billing Statement
Quarter 1 – August September	October 5	September Monthly Report
Quarter 2 – October November December	January 5	December Monthly Report
Quarter 3 – January February March	April 5	March Monthly Report
Quarter 4 – April May June	July 5 or sooner	June Monthly Report

GOOGLE DOCS AND GOOGLE DRIVES

Q. How do I use CWTP Excel spreadsheets when our district prefers we use google drive to store and save everything?
A. The CWTP electronic files can be converted to Google Sheets and utilized on a Google drive. Enlist the assistance of the Google trainer/expert in your school or district or technology support staff. Training is provided by Google on how to use Google tools at https://edu.google.com/training-support/professional-development/.

Steps to Convert from Excel to Google Sheets:
- On the Google Drive select *New*
- Select *File Upload*
- Select the CWTP Excel file to upload
- Once uploaded click on the CWTP Excel file
- Select *Open with Google Sheets*

Below are a few of links to YouTube videos that provide instructions for converting Excel files to Google sheets. The videos may not demonstrate the exact steps needed but will provide the general idea.

- https://www.youtube.com/watch?v=70TnpSc_98k
- https://www.youtube.com/watch?v=14vM_w5Fl7Q
- https://www.youtube.com/watch?v=WarFIt71p4E

Q. Last year my shared drive was Google. That's what our district uses mostly so I guessing this will still be okay? I think I had to put everything in sheets.
A. Yes, using a shared Google drive is still ok. Convert the Excel file to Google Sheets.

Q. I wish there was training on how to do all of this on Google Drive. It is so different!
A. Enlist the assistance of the Google trainer or expert in your district or school. Training, although not specific to the CWTP forms, is provided by Google on how to use Google tools at https://edu.google.com/training-support/professional-development/.

Q. How do the Excel spreadsheets work in Google?
A. The Excel files work when converted into Google Sheets. The functionality of the Excel formulas remain however the cell protection feature is lost. Cells that were "locked" in the Excel version will no longer be protected. This means there is user access to formulas that are in locked cells and unseen in the Excel version of the file. Be very careful to not accidently delete a formula when visible in the *Formula Bar*. An example of a formula as seen in the Formula Bar when a cell is activated follows: =IF(ISBLANK('Student Info '!J9),"Enter in Student Info Tab",'Student Info '!J9). A formula has a unique look, different from typical text. Do not delete formulas in any forms converted to Google Sheets.

Also, since cells are no longer locked the ability to utilize the *Tab* key to navigate from row to row is lost. Once the *Tab* key is used to navigate from the *Date* cell to the *Activities* cell, use the arrow keys on the keyboard to navigate to the next row. Or mouse click into the *Date* cell in the next row.

Cells outside of the form are also accessible. Stay within and only utilize the cells of the form.

FOLDER SYSTEM ON A SHARED GOOGLE DRIVE

Q. I am wondering if this can be housed on a shared Google Drive. If not, I will work with our District IT on the possibility of a shared drive.
A. A folder system can be developed on a shared Google Drive.

Comment: Google Sheets works pretty well to store and enter data. The only glitch was at the end of the month/quarter I had to download the Google Sheet and convert back to Microsoft Excel in order to send to our OVR counselor.
Clarification: Google Sheets has the capability to download the file to PDF. Select *File*, *Download*, and then select *PDF document (.pdf)*. In the Print Settings Window that opens make sure *Export* is set on *Current Sheet*. If not use the dropdown menu to change to *Current Sheet*.

CORRECTING THE CONTENT WITHIN THE FORMS

Q. Can the Employment Specialist go back and make corrections to the forms after the Primary Contact has reviewed them? Or does this require an amended report?
A. Any problems within the form should be detected, either initially by the Employment Specialist or upon review by the Primary Contact. Collaboration about and correction of errors should take place before the Primary Contact signs, dates and sends forms to the VR Counselor in PDF format. However, if after submission to OVR an error is detected, the Employment Specialist would need to make the correction in the student's Excel file. The Primary Contact again reviews the form and saves to PDF format, utilizing the renaming rules. Recommendation: add "2" or "rev" to the file name extension. Example: the original file was123456KentuckyPreETS_aug. The revised file name should denote a second or revised version of the file, such as 123456KentuckkyPreETS_aug2 or 123456KentuckyPreETS_aug_rev. Inform the VR Counselor that the file is a revised version of the form in the delivery email.

Q. Can the PDF file be changed if you realize that you made a mistake and need to make a correction?
A. Hopefully not. The reason for conversion to PDF format is 1) so changes cannot be made after completion of the review process and 2) that is the needed format for OVR to upload the document into the agency's management system. If the file is in PDF format but not yet sent to the VR Counselor, correct the error in the student's Excel file and convert to PDF version again. Do this with full knowledge and review by the Primary Contact. If an error is found after the file was sent to the VR Counselor, follow the guidance provided in the question above.

ACCESSING THE ELECTRONIC FORMS TRAINING AGAIN

Q. Will the CWTP Electronic Forms training module be accessible for future reference?
A. Yes. The CWTP 104: Forms module will remain available for a period of time on the HDI Learning site at https://www.hdilearning.org/. Links to the CWTP Electronic Forms videos will also be posted on the CWTP website. The date is TBD.

REFERENCE SHEETS OR USER GUIDE

Q. Will cheat sheets, handouts, quick reference guides or any type of written guidance be available to users? Particularly to assist with the file name rules?
A. As noted during the training, each Excel file has a *Directions* tab that provides instructions for completing forms and naming worksheets for submission to OVR. The directions are specific to each file. However, direction documents for each Excel file are also provided in PDF format on the CWTP site. In addition, a *CWTP Electronic File Naming Rules_Due Date Handout* is also posted.

MULTIPLE EMPLOYMENT SPECIALISTS

Q. Can multiple Employment Specialist work with the same student? How would that be submitted on the information and signature sheet?
A. Yes but forms may not allow the documentation for more than two. If two Employment Specialists are working with a student for Pre-ETS or Job Development/Job Coaching include the name of the Employment Specialist providing the service in each services row. There is room in the Employment Specialist signature cell for two names, if the names are not extraordinarily long. For other CWTP forms there is character space for two names in the Employment Specialist signature cell.

NOT FILING A REPORT/LATE REPORTS

Q. What happens if the report is not filed?
A. The district would not be reimbursed for the services provided.

Q. What happens if you are late reporting?
A. That would be a decision made by the VR Counselor. However there is no guarantee payment would be remitted for late reports and billing statements. Therefore it is highly recommended that reporting and billing occurs by the set due dates. Pre-ETS Monthly Report, Job Development/Job Coaching Monthly Reports and the quarterly billing statements should be submitted by the due dates. Transition Services forms and corresponding billing statements should be submitted upon completion and within the quarter authorized, with the exception of the Employment Follow-up Report. See the Employment Follow-up Services section on page 7.

Q. What happens if we have a "break" one month when no one is in the district from the 2nd through the 11th; do we need to make sure we are able to submit everything on the 2nd, or can we wait until the 11th?

A. Submit by the 2nd for Pre-ETS Monthly Reports, Job Development/Job Coaching Monthly reports and quarterly billing statements that are due. Transition Services reports and corresponding billing statements should be submitted upon completion and

within the quarter authorized, with the exception of the Employment Follow-up Report. See the Employment Follow-up Services section below.

THE EMPLOYMENT FOLLOW-UP SERVICES

Q. Are we able to complete the Employment Follow up Report when returning back to school in August, after the student exited in May since we can turn it in before September 5th? Or are we not able to do this as we will not have had the training for that year to provide billable services?
A. The Employment Follow-up Report and billing statement should be submitted as soon as the 60 days of follow-up services are completed. The date of submission of the report is dependent on when the student exited or graduated high school and the end of the 60-day timeline. For example, if the student exited or graduated in May the follow-up services would end in July. If the student exited or graduated in June the follow-up services would end in August. Technically September 5th is the last day the report and billing can be submitted, being the due date for the first quarter of the next fiscal year. But for that to happen the student would have exited late June or very early in July, which is not likely. Do not wait to submit the report and billing statement until September 5th when the 60 days of employment follow-up was completed in July or early to mid-August. This is important because after the 60 days of CWTP follow-up is completed, OVR provides the student an additional 30 days. A break in services to the student would occur if the report and billing is not submitted as outlined above.

Q. What if you are only paid through the end of the school year as Employment Specialist?
A. You would probably be unable to provide the 60 days of employment follow-up in that case. The student would not receive the needed and authorized service and the district would be unable to bill or receive reimbursement. Follow-up services are included in the district's Memorandum of Understanding with OVR. The expectation is the services will be provided if authorized.

A discussion at the district level is recommended for determining the provision of services after the end of the school year. Two suggestions are to extend the number of working days within the Employment Specialist contract or develop a separate contract for the summer months to include needed hours and mileage reimbursement for the provision of follow-up services.

Q. It was stated that authorization for the Employment Follow-up Report is provided in the 4th Quarter of the year before (before June 30th). Just making sure this is correct?
A. That is correct. But the authorization is for employment follow-up services, not just the report and billing statement documenting the services.

BILLING IN JULY

Comment: I thought that nothing could be billed in July. Thank you for that clarification.
Clarification: June monthly reports and 4th quarter billing statements can be submitted on or before July 5. Submission by June 30th is recommended due to the end of the OVR fiscal year. The Employment Follow-up Report can be submitted and billed in July, dependent on the end of the 60-day timeline for follow-up services. See the Employment Follow-up Report on page 7.

FORM CHANGES FROM LAST YEAR

Q. If you only work with mostly students receiving PreETS, did the forms stay the same?
A. The PreETS forms were tweaked some this year. New information was added to the *Student Info* tab, including new demographic data that auto-fills into each report form and billing statement. The form is in landscape layout this year, due to the added demographic data. Also Row 15 is frozen so the headers for each column are visible as each row in the form is completed.

OVR CASE NUMBER DIGITS

Comment: FYI the OVR case numbers are 6 digits while our authorization numbers are 7 digits.
Clarification: The OVR Case Number is six digits, not seven as demonstrated in the training videos. Use the six digit OVR Case Number for the file name going forth.

Q. Instead of the SSID # we will be using the OVR case # when renaming files, is this correct?
A. Yes. The CWTP team members (HDI and OVR) determined the OVR case number was more meaningful and useful for the VR Counselor.

WHAT WAS SHOWN DURING THE TRAINING MODULE

Q. What were you showing us during the videos, was it a shared document between the ES, the primary contact, and OVR?
A. The demonstrated during the training videos could be interpreted as a document, on a shared drive, particularly between the Employment Specialist and the Primary Contact. It was not a shared drive in reality. Files on a local drive were used for the demonstration activities.

PRINTING THE DOCUMENTS

Q. Must all paperwork, billing statements and reports will be saved 2 times? Once as you fill it out as a hard copy and then the primary contact will save again as a PDF?
A. The Employment Specialist and CWTP Primary Contact should always save changes in the Excel file, any time changes are made. The Primary Contact will save particular forms (worksheets) within the file during the conversion of a report or billing statement to PDF format. There is no hard copy in either procedure, only the student's Excel file and the PDF versions of reports and quarterly billing statements.

Q. Are these forms to be printed and filed in the student's file or is an electronic file good enough?
A. Keeping a hard copy in a student file is a local decision. If the district is chosen for a CWTP Program and Compliance Review hard copies may be requested. Or the review may be conducted with access provided to the electronic files. That determination will be made when a district is scheduled for a program review.

FILE NAMING RULES

Q. I am not technically considered an employment specialist. I was wondering if I need to name my files anything in order to differentiate them.
A. If you are using and naming files for the CWTP program you should follow the master rules for file names.

Comment: My biggest issue is the extensions and when to use the "_" and when not to use the "_".
Clarification: A *CWTP Electronic File Naming Rules_Due Date Handout* is posted on the CWTP website that will assist with file name extensions and use of underscores.

OVR BUDGET YEAR

Q. Who adds the OVR budget year info on the form?
A. No one will add the OVR budget year into the form. When the quarter is selected in the School Reporting Quarter cell the OVR Reporting Quarter cell will auto-fill via a hidden formula. The budget year is included in the names of both sets of the quarters.

PRIMARY CONTACT

Q. How is my primary contact who is our special education director for our high school (of 2,000 students) supposed to keep all of these different file names straight when she already has so much on her plate?
A. It is permissible to name more than one Primary Contact for a large high school or district.

UNSAVED OR DELETED FILES

Q. What happens if you forget to save or the file gets deleted?
A. If you forget to save any changes made are lost. Learn to save frequently when working in files and always before closing a file. If a file gets deleted look in the Recycle Bin. If the Recycle Bin has not been "emptied" the file can be found there and restored.

COULD NOT SEE PDF CONVERSION ON SCREEN

Comment: Got it I don't have to do the converting. I still would like to see this on a bigger screen the demo is not working for me.
Clarification: Apologies if the demo site screen was not maximized during the recordings. Expanding the recording to full screen may have helped. If you need additional assistance contact jill.griffiths@uky.edu to schedule a consultation.

NAMING FILES

Q. Why do we have so many ways and names to save these files when I'm sure there must be a simpler way than trying to remember all of these ways and making it more complicated for our primary contacts who already have very little time?
A. Submit your suggestions for file naming for consideration for next year.

PDF PROCESS DEMONSTRATED DURING RECORDINGS

Comment: The way our system converts to PDF and the way you are teaching it are totally different.
Clarification: Yes, as noted during the training sessions the presenter could only demonstrate using the PDF application installed the computer being used. Several programs were mentioned during the training sessions that convert a file to PDF format, such as PDF printer drivers, Print to PDF with Adobe, Microsoft Print to PDF, and Open Source PDF to print. Consulting with district or school technology personnel about the options available at the local level was recommended during training.

FILE RETENTION

Q. What is the time line for keeping student files?
A. Refer to your district policies and procedures for file retention.

TECHNICAL ASSISTANCE

Comment: I would like in person assistance with the initial downloading of files.
Clarification: For technical assistance with the three Excel files contact Jill Griffiths. Email: jill.griffiths@uky.edu. Cell: (304) 633-7161. Office: (304) 523-7900.